



STEPS IN PLANNING

- 1 Develop the process** (Chair, Executive Director, Consultant)
 - ✦ Hire a consultant
 - ✦ Appoint a Planning Committee, or assign the planning task to an existing committee
 - ✦ Establish a timeline for planning
 - ✦ Set the date for a full Board retreat
 - ✦ Determine the scope (time and subject matter) of the plan
- 2 Inform the key players** (Chair)
- 3 Do a pre-planning assessment** (Consultant)
 - ✦ External environment: political climate; changes in federal, state, local laws and policy; economic trends; status of competitors; technological issues; other hot issues
 - ✦ Internal environment: the status of the organizations' programs, finances, governance, administration
 - ✦ Written report to Board
- 4 Conduct a full-day Board retreat** (Consultant, Chair, Executive Director)
 - ✦ Discussion of the organizational assessment
 - ✦ Identify the critical issues facing the organization and the strategic directions the organization will take in response to those issues
 - ✦ Develop/refine the mission statement
 - ✦ Identify the broad organizational goals to guide the organization for the next three to five years
- 5 Develop objectives for each goal, i.e., quantifiable accomplishments that establish progress on the goal** (Staff, consultant, Planning Committee)
- 6 Develop implementation plans for each objective** (Staff, Chair, committee chairs, consultant)
- 7 Develop staffing plan** (Executive Director)
- 8 Develop three-to-five year financial projections** (Executive Director, consultant, Treasurer)
- 9 Create first draft of plan for review by Planning Committee** (Executive Director)
- 10. Plan review by relevant Board committees** (staff, committee chairs)
- 11. Second draft of plan** (Executive Director)
- 12. Plan to Board for approval** (Chair)